



Building a Help Desk System

Are you trying to support an entire school district full of computers with just a few hardware technicians? Do you have a non-technical person answering the phone? Are the teachers getting upset because of the length of time it takes to resolve their issues?

Unfortunately, I had to answer yes to all three questions. Our school district includes 3,000 computers distributed among 14 physical locations. We averaged 375 calls per month and had a support staff of only five technicians. Teachers and other school-level staff expressed their unhappiness to whomever would listen, and my staff was starting to show signs of burnout.

By taking a look at our statistics on the number of calls we received and the average number of days it took for us to resolve the issues, I realized it was time for a change. It was taking us on average three weeks to even walk into a classroom to make an initial determination as to what the issue was. No wonder the teachers were unhappy! Looking a bit deeper into the data, I started to realize that some of these calls were really simplistic, such as reconnecting the power plug to the outlet or resetting an e-mail password.

These were issues that a technically competent person could handle over the phone.

The questions started to form immediately. How many calls could we handle over the phone? How

By Sheryl O'Shea

Subject: Infrastructure management

Standards: NETS•A IV (<http://www.iste.org/nets/>)

earn your ISTE certificate

Instructional technology leaders are now earning an ISTE Certificate of Proficiency for their knowledge and use of technology in the classroom. Join the online Capstone Program to demonstrate your knowledge of instructional technology and gain a deeper understanding of the ISTE National Educational Technology Standards for Teachers (NETS•T).

The Capstone Program features:

- Convenient online courses including a free, self-paced introductory course and two facilitated Capstone courses
- Discussion and collaboration among diverse, experienced educators
- Development of personal online portfolios that demonstrate your evidence of standards in practice
- Experienced coaches to guide and support your work

Begin with the **free** Capstone introductory course to see if the Capstone Program is right for you. To enroll today, visit

pbs.org/teacherline

or call

1(800) 572-6386



PBS TeacherLine®



iste
www.iste.org

CERTIFICATE OF PROFICIENCY IN THE NETS•T

many calls could be completed more quickly either by having additional knowledge or because a technician diagnosed the problem more fully over the phone? Could we get down to three-day turnaround on the initial diagnosis? Could we improve our relationships with users? Could I keep my technicians from fleeing for better, less-stressful jobs? And most important, could I provide the teachers with consistently working equipment so they would use the technology to improve their educational process?

One answer that held hope for all these challenges was a help desk. Essentially, a help desk is one phone number, a technical person answering calls, and a networked call database system. To properly set up an inexpensive, yet highly effective, help desk you need to address many areas:

- Planning
- Staffing and training
- Service agreements
- Teacher/staff relations
- Technical skills
- Phone etiquette
- Call database

Planning is very important in implementing a successful help desk. The initial setup is crucial in getting ready to receive those first calls. You must be successful from the get go to build rapport with your callers and to generate a feeling of goodwill. Remember that they already believe the service they are going to receive is substandard because that is the history. Planning allows you to concentrate on the objectives of the help desk, enabling you to provide the services that will produce the greatest effect on the integration of technology into the classroom.

Staffing is equally important. The most important people in a help-desk environment are the administrator and the personnel who answer the phone. I believe the personnel staffing the phones are the most important

people in any service situation. They must have compassion and understanding, and they must hear the teacher. This goes beyond the actual listening to the technical aspect of the issue to the feelings and emotions that they are communicating. Technicians need to be capable of asking the proper questions to get to the root of the problem while at the same time being empathetic to the situation the teacher is faced with in the classroom. Staff must be technically competent and capable of talking an often frustrated client through the steps required for correcting simple issues over the phone. If the problem is beyond the capabilities of the teacher and/or of the help desk technician, a hardware technician should be dispatched.

The help desk should be available at least during the operating hours of the district. Staff should be able to leave messages during off hours. It is important that you prompt callers to a message system with the critical information your technicians will need. You should ask for the caller's name, phone number, school, room number, description of the problem including any error messages, and what they may have attempted to resolve the issue themselves. It is a good idea to generate an automatic return message that confirms the receipt of the message and assures the customer that their issue will be resolved within the parameters of the service level agreement (SLA).

An SLA is a written document that describes the service you will provide to the district. Minimally, you need an SLA for each building, or each school in districts where multiple schools reside in one building. A good SLA will describe the setting; for example, building A has four labs with 30 computers and 20 individual classrooms with four student computers and one teacher computer each. It will also set the level of criticality for each setting and the appropriate re-

sponse time for each level; for example the labs are set at the critical level with a four-hour response time and the classroom computers are medium level with a three-day response time, whereas the teacher workstation is set to the high level with a one-day response time. The level definitions, associated response times, and the computers that fall under each level need to be set by committee. This committee must include the principal, technology director, and a representative group of teachers. In a high school or junior high school, this group would likely be composed of the department heads. In an elementary school, I recommend a representative from each grade level. This inclusion process ensures that many voices are heard and that input is gathered from as many people as possible. You will need to hold approximately four meetings to accomplish the goal of creating an acceptable SLA.

The *first meeting* would be used to explain the process and to ask for input from the teachers present as well as the teachers that they are representing. The *second meeting* will be used to gather the information and to listen to the teachers. This is very important, as many of them will feel as though they have never been listened to before. Give them the time they need and document all that you hear and see. The *third meeting* will be for you to present a preliminary SLA, with a request for changes, additions, or deletions. Finally, the *fourth meeting* will be to present the final document and to celebrate the success that your group has achieved. You now have an agreement that each party will strive to meet, that will set the tone for service, and will provide a base line that will put the users at ease as they now know what to expect when they call the help desk. This goes a long way in creating goodwill.

Training for the phone staff is critical. They need to be in a train-

ing cycle where they are continually updating their skills in the following disciplines:

- Phone etiquette
- Technical changes and upgrades
- Dealing with difficult clients

You must remember you're being called because they have a problem. They are already frustrated, possibly angry because something didn't work as it should have, and they may take it out on the person who answers the phone. Therefore, training staff to answer the phone and deal with each issue in a positive manner is the key to starting a good relationship. In a school district, every caller will be a repeat customer, therefore establishing a good rapport from the beginning is critical.

Recording calls is also extremely important. This allows you to monitor a vast amount of data including number of calls, types of calls, number of successfully resolved calls, and average time required to solve problems. This is where you can really begin to understand the whole picture. By analyzing the data, you can further optimize your support program. You can determine if additional training is needed for the staff, if staffing levels are meeting the needs of the district, and other facts to allow you to make better decisions and necessary changes.

This is also the way that your hardware technicians can retrieve their calls. We set up an Access database with all of the information we deemed necessary to record trouble calls. Your database will likely contain the school, teacher name, room number, brief description of the problem, and a call date and time. Putting this database on a computer that is shared or on a network server enables hardware technicians to retrieve calls from any computer within the district. This will reduce the amount of phone calls needed to dispatch hardware techni-

cians to the appropriate location as quickly as possible.

We have had our help desk in place for about two years and have seen some wonderful results. My staff are all still with me, and although burn-out is always an issue with technical staff, all are currently happy with their jobs. My help desk technician is able to resolve about half of the now 275 calls we receive each month. We attribute the drop in the number of calls to the reduction in repeat callers due to our increased initial response time of about four days for medium to low calls. We now respond to problems in our labs within an hour. Although we continue to have calls open for as long as three weeks, we have met with the user, diagnosed the problem, and are waiting on a part or have discussed an appropriate time to correct a more complicated issue with the user. Finally, we sent 500 surveys to our customers at the end of the year with a return of about 20%. We had only one survey that expressed any dissatisfaction. We are extremely pleased with the results of our help desk implementation and are continually looking for ways to take our service to the next level.

Getting a help desk started is fairly simple, but to ensure continued success you need to continually revise and adjust based on the expectations and needs of the users in the schools. You also need to continue expanding the capabilities of your phone and hardware technicians. Maintaining and assessing the data your help desk generates is another key in providing the best possible service.



Sheryl O'Shea is the technology director for the Sylvania (Ohio) School District. Sheryl holds a BBA and dual MBA degrees from the University of Toledo and is currently a doctoral student in educational leadership & change at Fielding Graduate University in Santa Barbara, California.